Contact Management
Quick Start Guide

Contact Management is a collection of Agencies and Individuals' name, address and contact data. Every system user is also an Individual in Contact Management. Individuals can be associated with Agencies. An additional feature is Groups. Groups can be built for associating like Agencies and Individuals (and sub groups) into 1 grouping. This can be beneficial for mailings.

AGENCY

Adding an Agency:

From the **Main Menu**, click the **Contacts** tab on the main menu. You will be transferred to the **Individuals Search** page.

Click on the **Agencies** button. You will be transferred to the **Agencies Search** page. Perform the 'Search for an Agency' steps listed below. Before adding an agency you must complete a search before you will have access to the 'Add New Agency' button.

Click the **Add New Agency** button. You will be transferred to the **Agencies Details** page.

Fill in the 'Agency Name' and 'Federal ID Number' both of them are marked with required field indicators.

Select a 'Preferred Contact Method' from the dropdown, depending on what you select as the preferred method, determines what you need to add below. If you do not add a mail address if you select that as the contact method you will receive a validation error message.

Select an Agency type from the dropdown.

Click the 'Add New Address' button. The record will be added and be in edit mode. Select the 'Address Type' from the dropdown and fill in the rest of the information.

When complete, click the 'Update' button in the address block. If you do not click 'Update' you will receive an error if you try and save it first.

Click the 'Add Phone Number' button. Fill in the number and click the 'Update' button.

Click the 'Save' button. The information will be saved to the database and you will be transferred back the 'Agencies Search' screen.

Eligible to Apply for Grants Checkbox: This field indicates if the Agency can be an Applicant Agency for grants and utilize the system with the appropriate security data in place. Only Fiscal roles can enter and maintain these Agencies to ensure their data (name, address, etc) matches the legal data for contract purposes.

Funding Agency Checkbox: This field indicates if the Agency is a 'Funding Agency' and is used to populate a dropdown list in Portfolio Management. Default is unselected.

Email Address Text Box: This field is required if email is selected as the Preferred Contact Method.

Agency Cleared Checkbox: This indicator is primarily used as mechanism to prevent duplicate Agencies from being keyed into the system by External users. External users have the ability to add new Agencies into Contact Management if they do a search and can not find the correct agency name to be listed as a Recipient Agency (different than Applicant Agency). When an agency is added by an External user in this manner, the Agency is marked as Not Cleared. A system administrator must periodically search for uncleared Agencies and determine if they are unique to the system and can be marked as Cleared. If a duplicate is entered the administrator has the ability to search for the existing duplicate and Merge the 2 records into 1. This is initiated by the 'Process as Duplicate' button.

Editing an Agency:

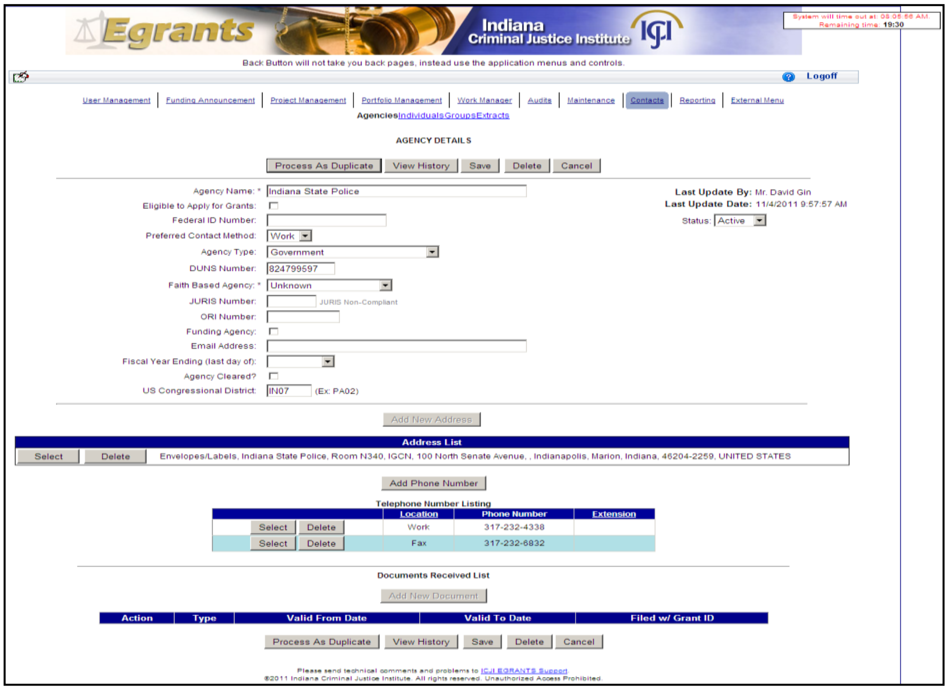
From the 'Main Menu', click the 'Contacts' tab on the main menu. You will be transferred to the 'Individuals Search' page.

Click on the 'Agencies' link. This will transfer you to the 'Agencies Search' page.

Type the Agency name in the text box or any part of the agency address information that you might have to narrow the search.

Click the 'Search' button. Click the Agency name in the search results grid.

You will be transferred to the Agency details page where the data can be edited.



INDIVIDUAL

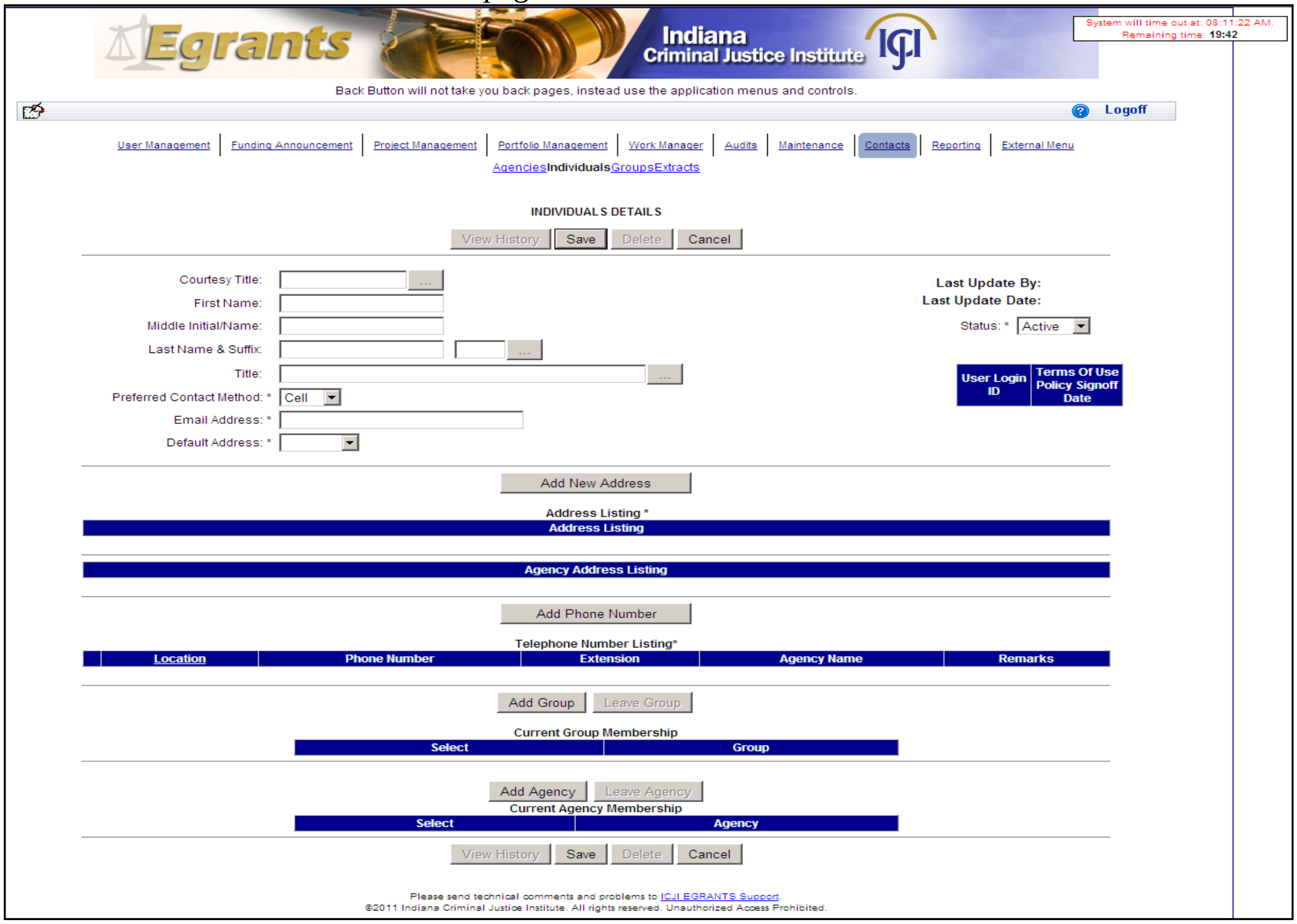
Adding an Individual:

From the 'Main Menu', click the 'Contacts' tab on the main menu. You will be transferred to the 'Individuals Search' page.

Type the search criteria into the fields of the 'Individuals Search' screen. Although you could search by 'State' or 'County' only it is best if you put as much information into the search criteria as you can to narrow down the number or records returned.

Click the 'Search' button. All of the records that match your criteria will be displayed in the grid. If there are many records you may sort the records by Last Name, First Name, Title, City or County by clicking on the column headings that are underlined.

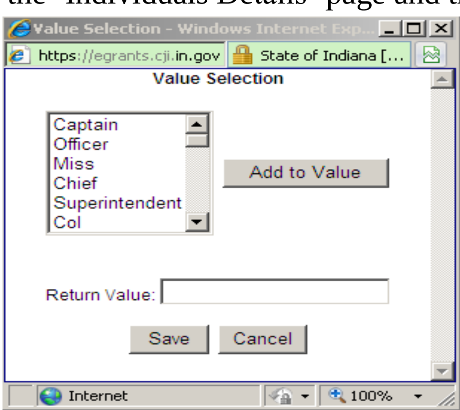
If the person you are searching for does not exist, click the 'Add New Individual' button. You will be transferred to the 'Individuals Details' page.



Type in the information for the individual you are adding.

If you click on any of these boxes with the 3 dots a popup window will display with valid choices for the text box. You may still type your own in the textbox these are the most common.

Make your selection in the box and then click the 'Add To Value' button. The value will be displayed in the 'Return Value' box. Click the 'Save' button and you will be transferred back to the 'Individuals Details' page and the value will be in the text box.



Click the ‘Add New Address’ button. Fill in the address information and click ‘Update’.

Click the ‘Add Phone Number’ button. Fill in the phone number and click ‘Update’

Click the ‘Save’ button to save the record to the database. You will be transferred to the ‘Individuals Search’ screen.

Edit an Individual:
From the ‘Main Menu’, click the ‘Contacts’ tab on the main menu. You will be transferred to the ‘Individuals Search’ page.

Enter the desired search criteria. Click the ‘Search’ button. Click the Individual name in the search results grid.

You will be transferred to the Individual details page where the data can be edited.

GROUP

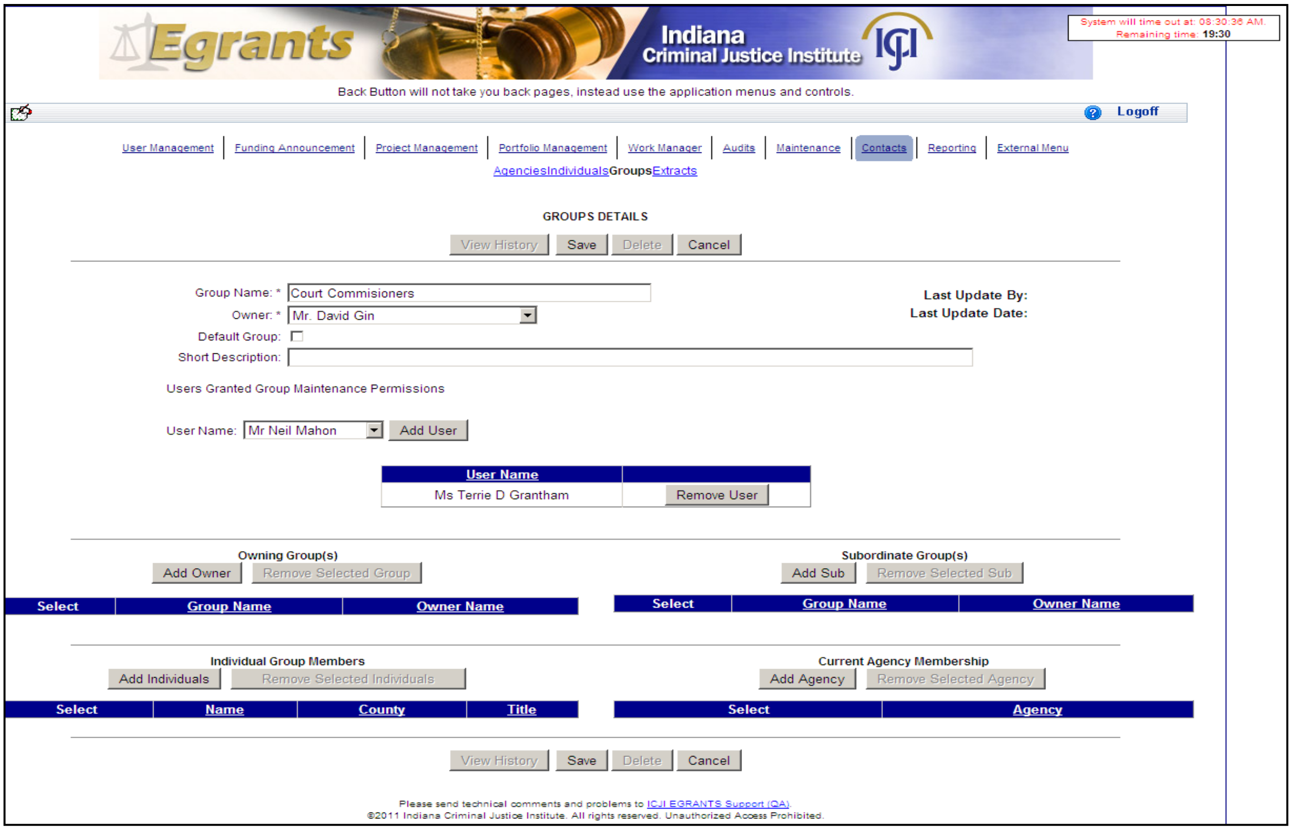
Groups

From the 'Main Menu', click the 'Contacts' tab on the main menu. You will be transferred to the 'Individuals Search' page.

Click on the 'Groups' hyperlink. This will transfer you to the 'Groups Search' page.

Type in the desired search parameters and click the 'Search' button. The groups that match the criteria you entered will be displayed in the grid.

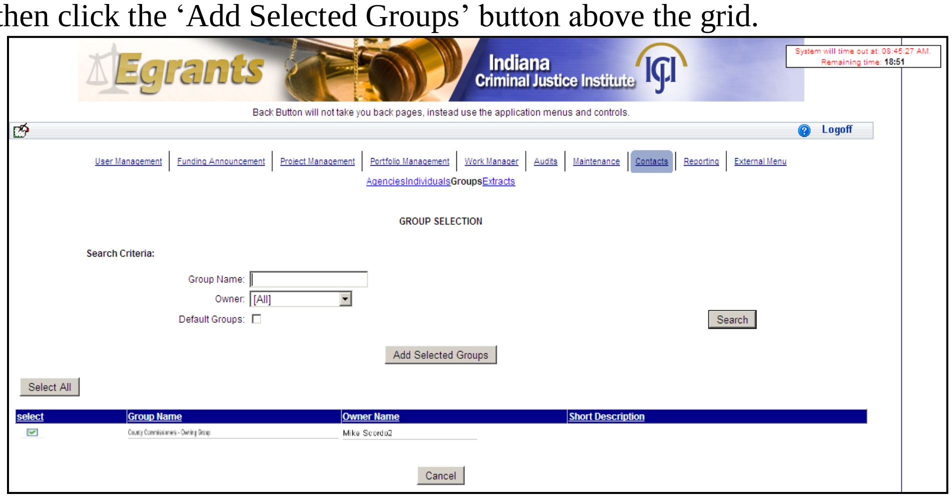
Select the desired group by clicking the Group Name link. The Group Details pages will be displayed.



Add Owning Groups

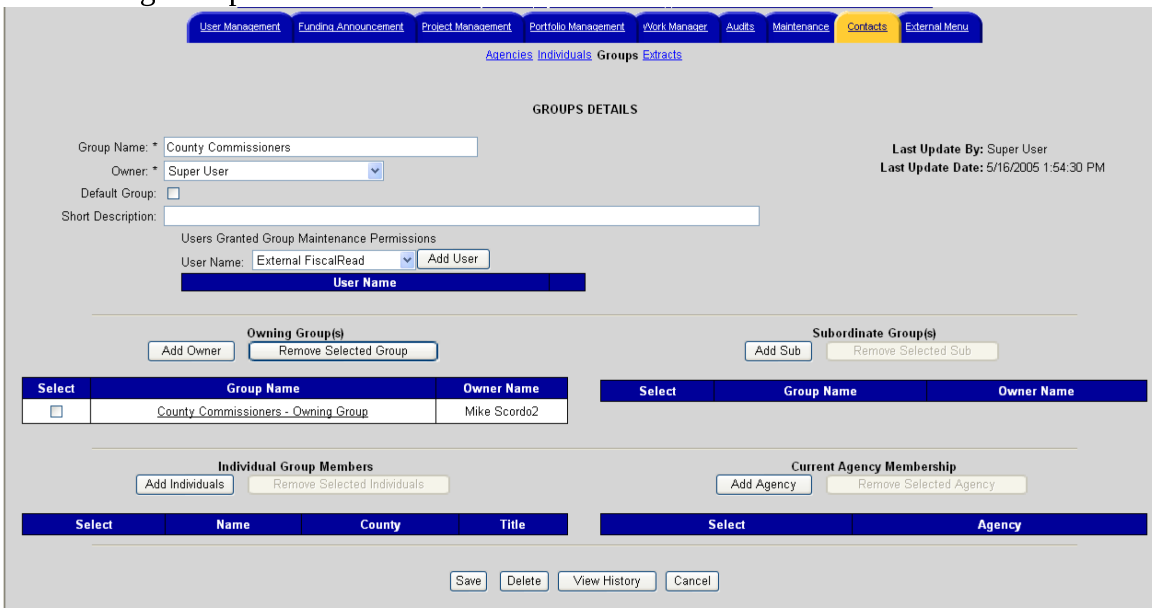
Click on the 'Add Owner' button below the 'Owning Groups Name' label'. You will be transferred to the 'Group Selection' screen. Here you will search for the group that you wish to be the owning group of the one you are currently working with. Enter your criteria to find the group and click 'Search'.

Select which group you want to be the owner and check the 'Select' box next to the group(s) and then click the 'Add Selected Groups' button above the grid.



Note: Due to the lack of data currently in our system, the screenshots covering Groups will be taken from a similar Egrants application used by the State of Pennsylvania.

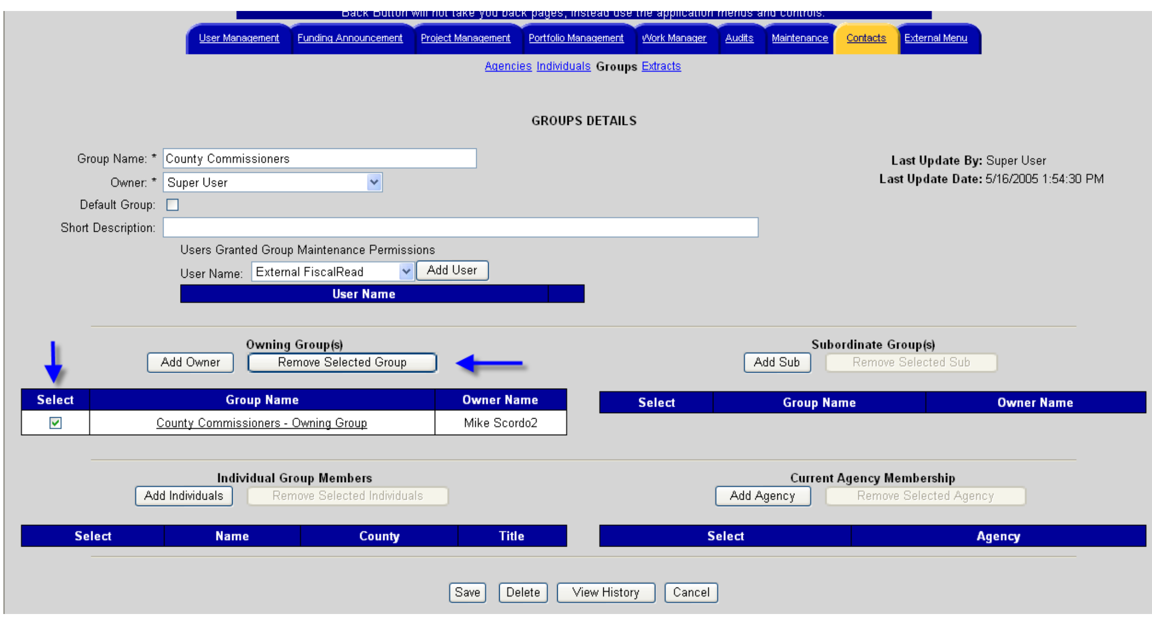
You will be transferred back to the ‘Groups Details’ page and the group you selected will be listed as an ‘Owning Group’



The user adding the Owning Group, must also have read write access to the owning group.

Delete Owning Groups

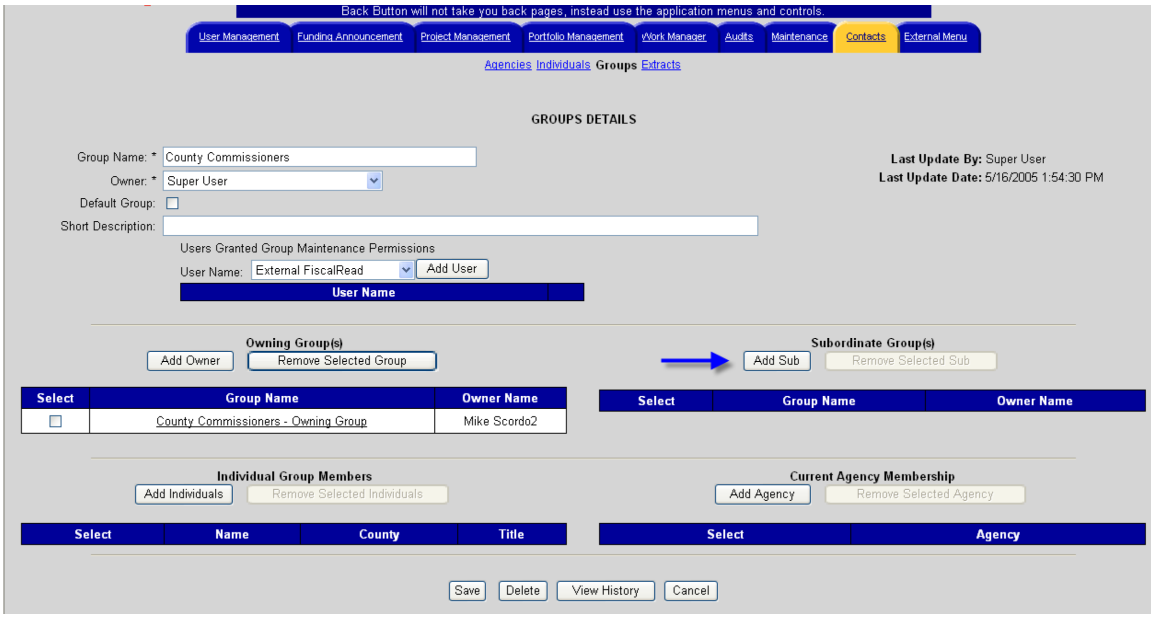
Check the box next to the ‘Owning Group’ that you wish to remove. Click the ‘Remove Selected Groups’ button above the grid. You will receive a confirmation box.



Click ‘OK’ if you wish to delete the group, ‘Cancel’ if you wish to leave the group unchanged.

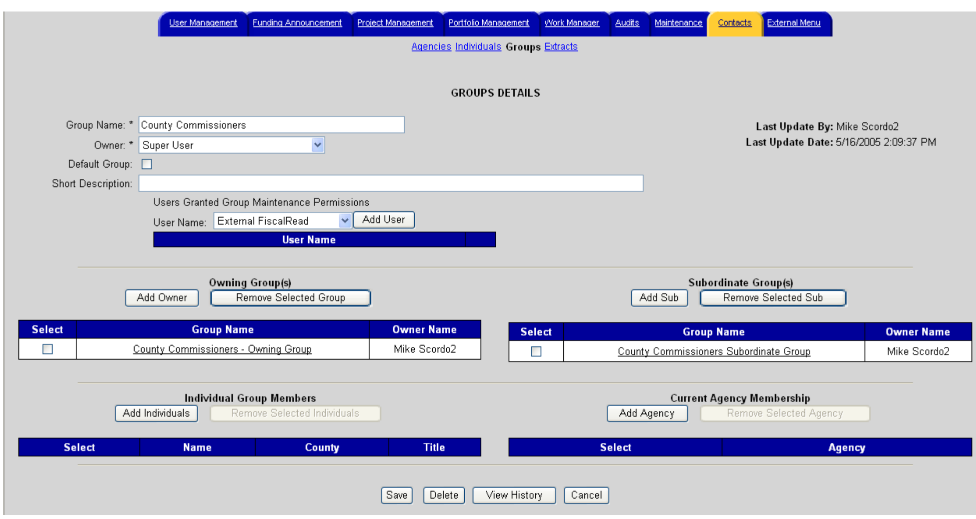
Add Sub Groups

To add subordinate groups, click the ‘Add Sub’ button. You will be transferred to the ‘Group Selection’ page.



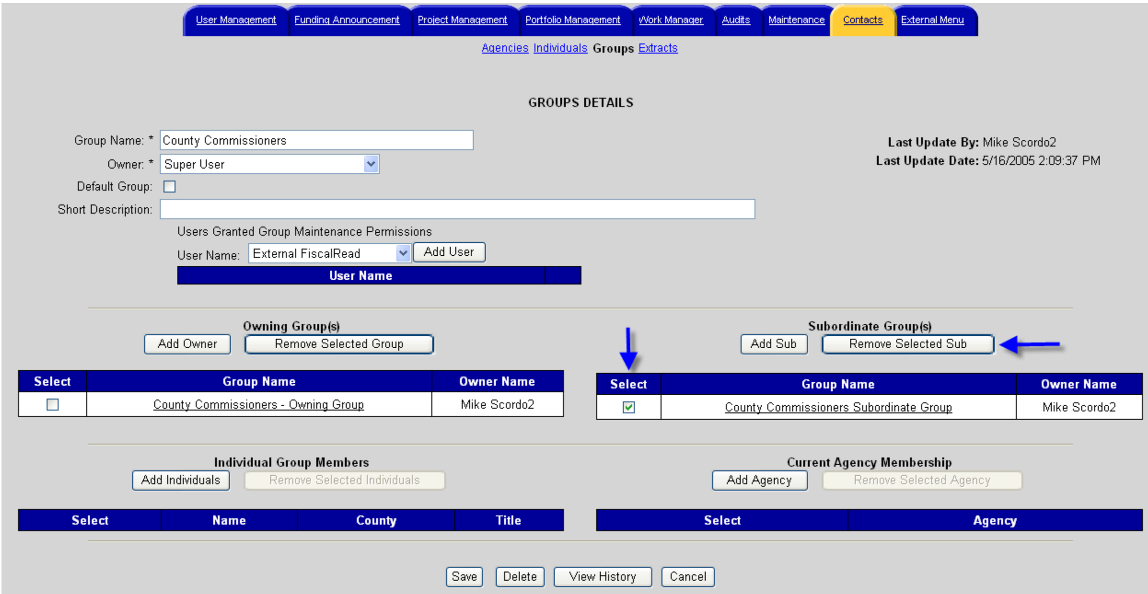
Enter the information for the search criteria and click Search. Select the row of the group that you wish to add by checking the checkbox in the select column.

Click the ‘Add Selected Groups’. You will be transferred back to the ‘Groups Details’ page and the group you just added will be displayed in the ‘Subordinate Group’ grid.



Delete Sub Groups

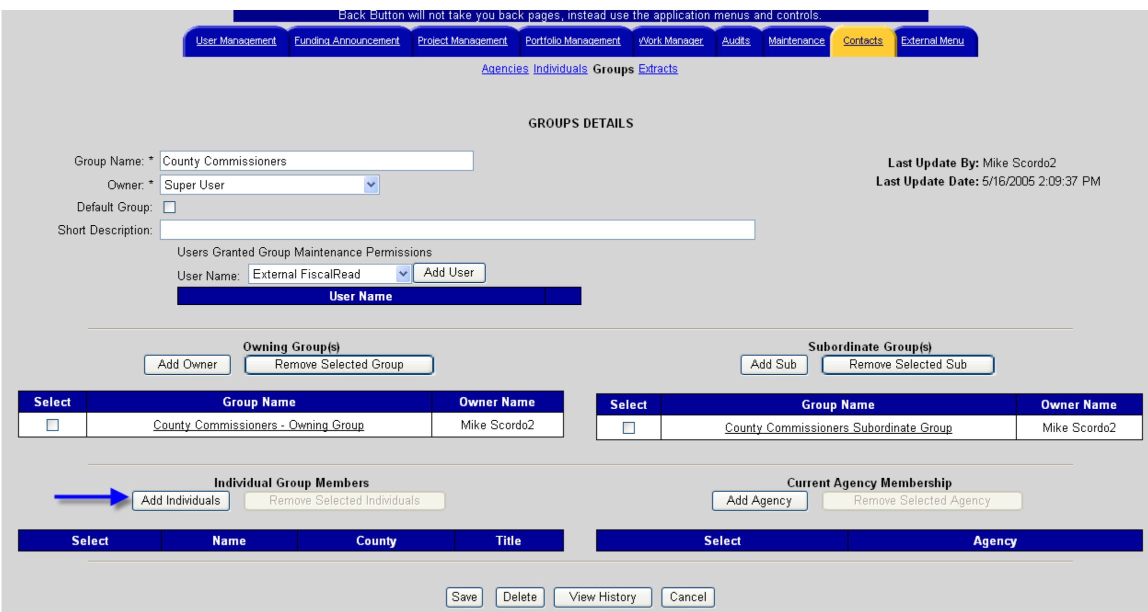
Select the group or groups that you wish to delete as subordinate groups by checking the select checkbox. When you have them all selected, click the 'Remove Selected Sub'.



A confirmation dialog box will be displayed. Click the 'OK' button if you wish to remove the records, 'Cancel' if you want to leave it there.

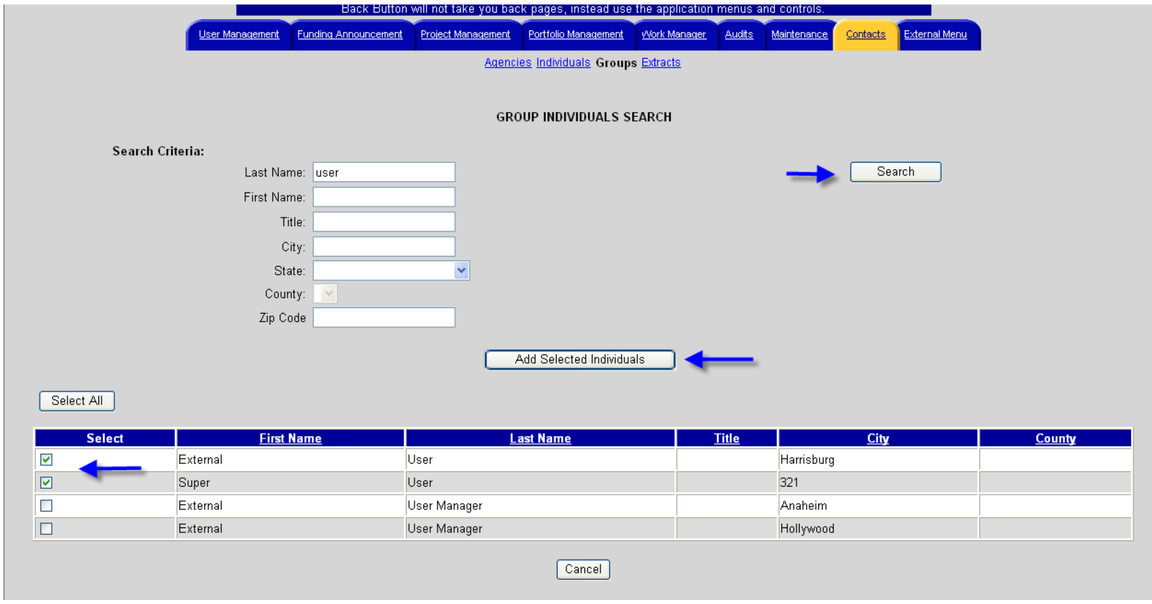
Add Individual Group Members

Click the 'Add Individuals' button. You will be transferred to the 'Group Individuals Search' page.

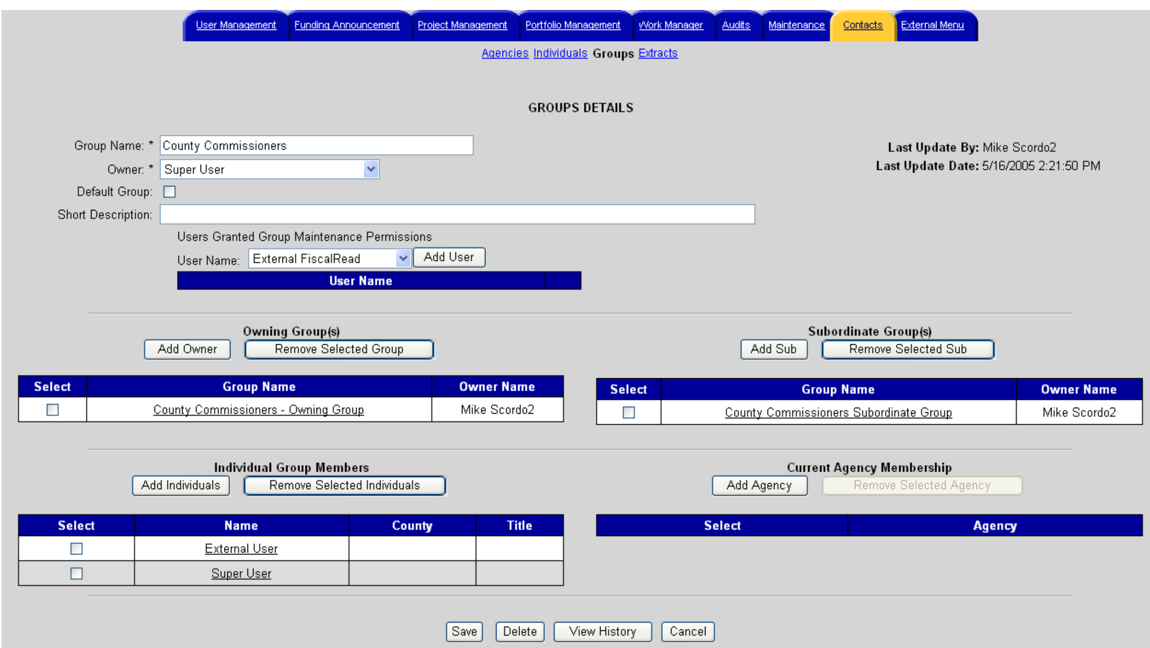


Enter the search criteria and click the ‘Search’ button.

Click the checkboxes in the select column for the records that you wish to add. Click the ‘Add Selected Individuals’ button.



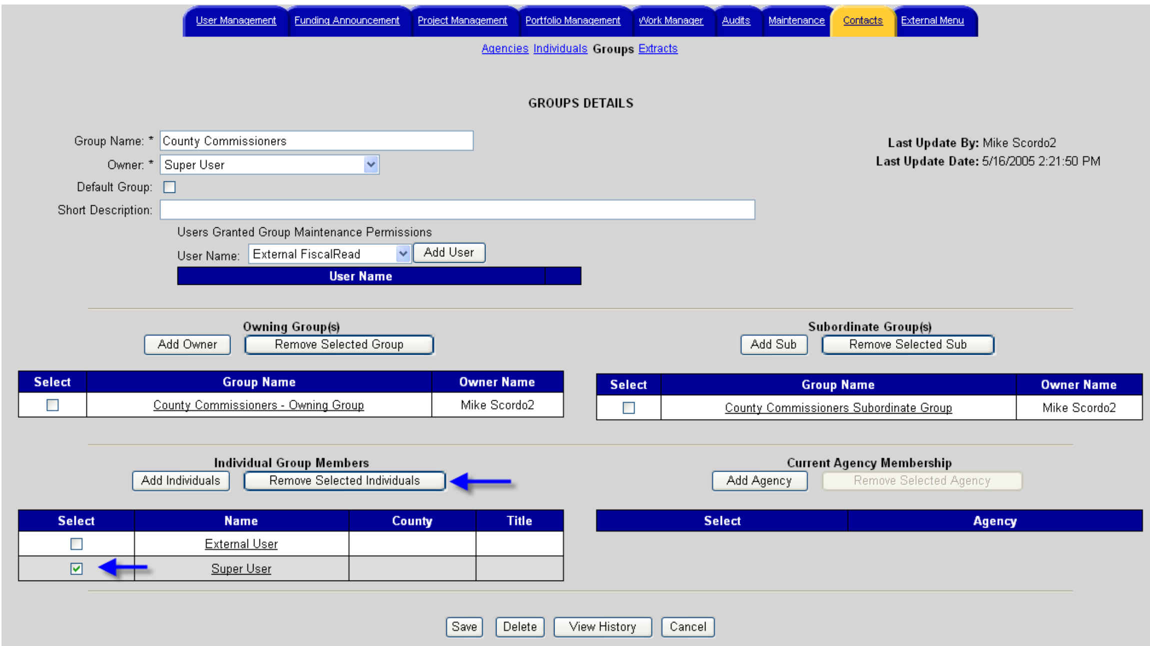
You will be returned to the ‘Groups Details’ page. The name you selected on the previous page will be displayed in the grid. Click the ‘Save’ button to save changes.



Delete Individual Group Members

Use the checkboxes to select the individual members that you wish to delete.

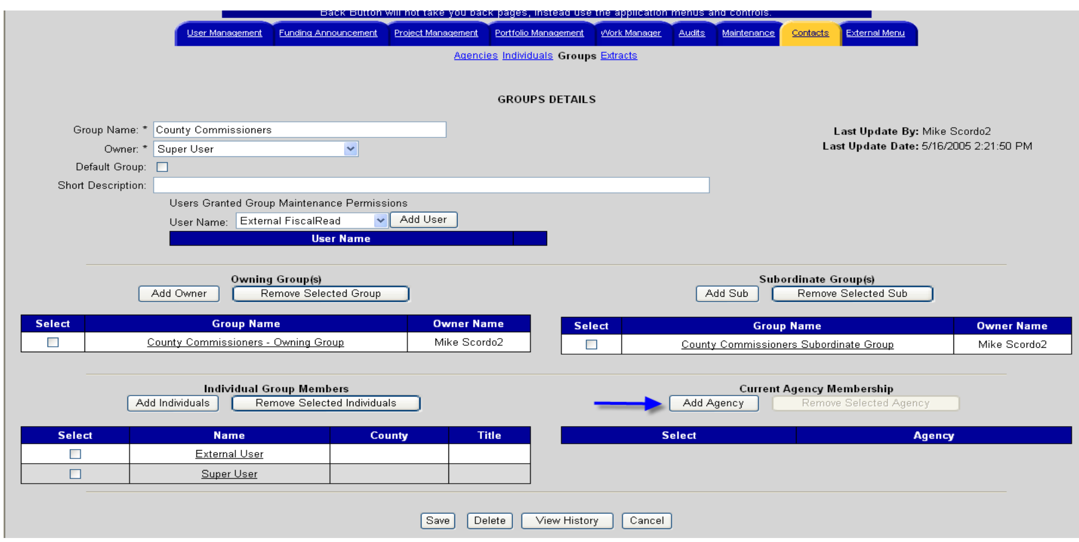
Click the 'Remove Selected Individuals' button. A delete confirmation dialog box will be displayed. Click 'OK' if you want to delete the individual, 'cancel' if you want to leave it.



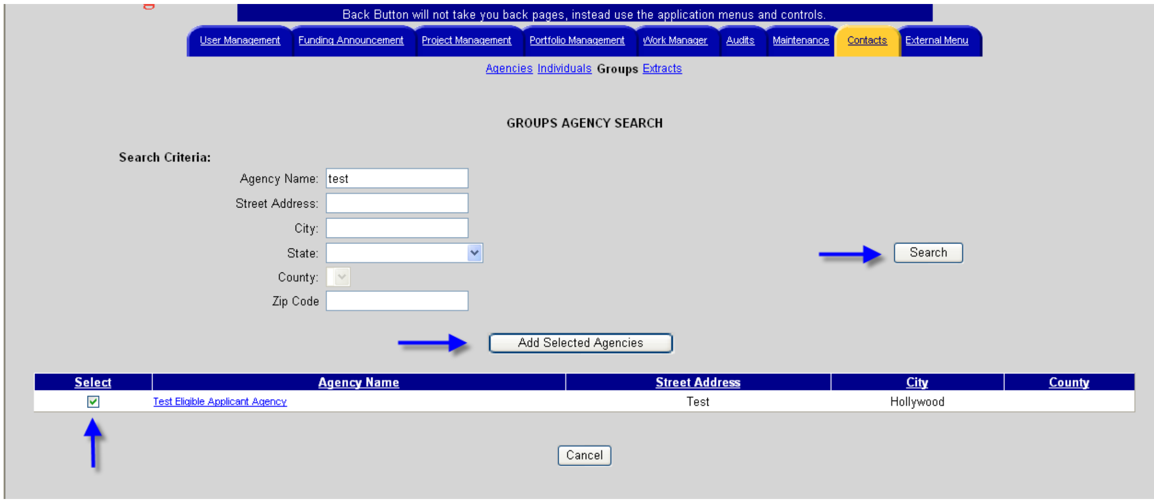
Add Agency Membership

Click the 'Add Agency' button. You will be transferred to the 'Groups Agency Search' page.

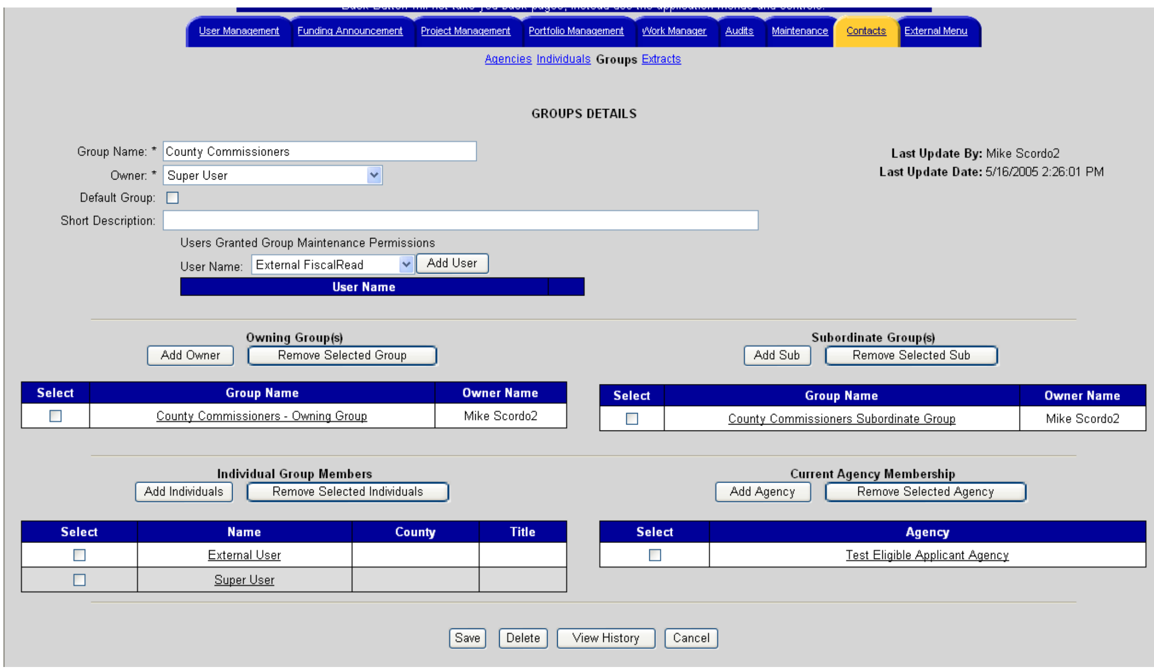
Type in search criteria and click the 'Search' button.



Click the checkboxes in the select column for the records that you wish to add. Click the 'Add Selected Agencies button.



You will be returned to the 'Groups Details' page. The Agency you selected on the previous page will be displayed in the grid.

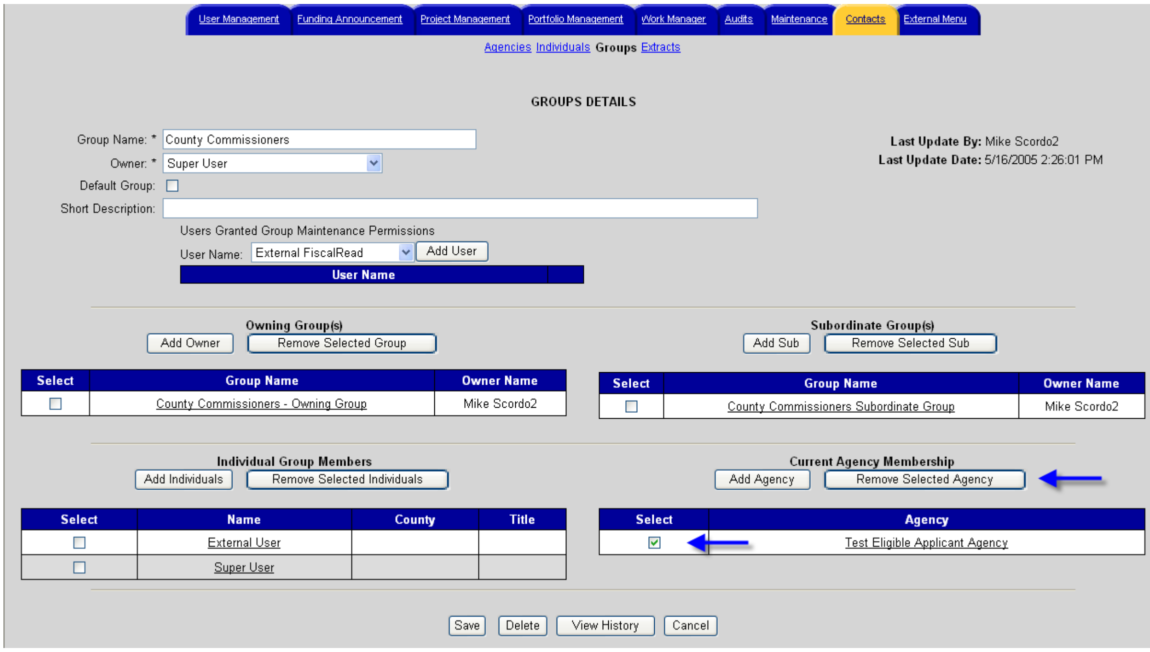


Click the 'Save' button to commit the changes.

Delete Agency Membership

Use the checkboxes to select the Agencies you wish to remove from the group.

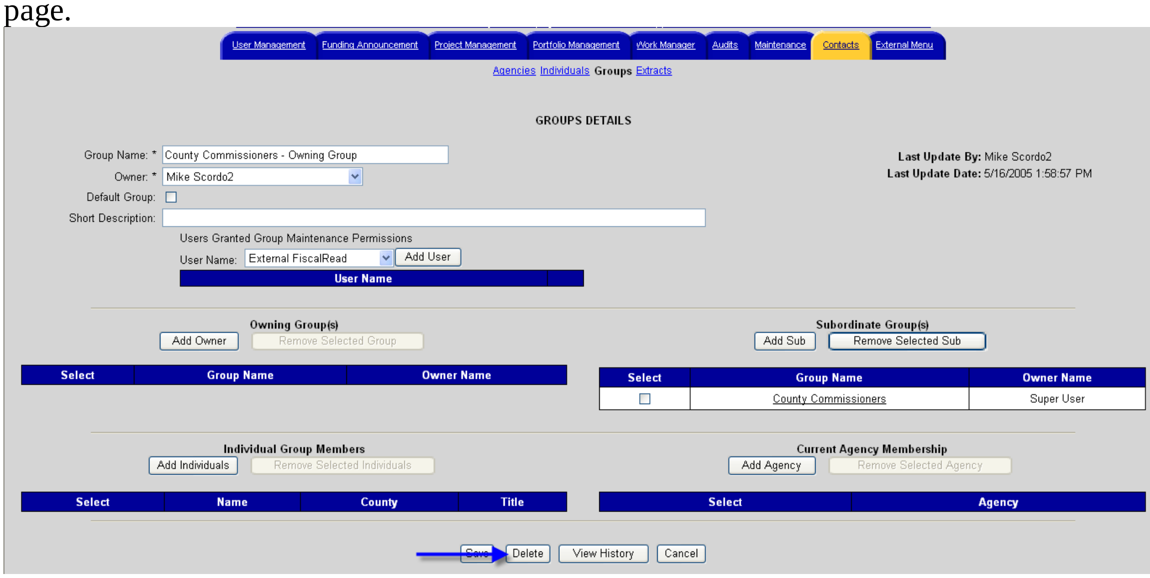
Click the ‘Remove Selected Agency’ button.



A confirmation box will be displayed. Click the ‘OK’ button if you wish to delete the record or ‘Cancel’ if you wish to leave the record.

Delete a Group

Click the ‘Delete’ button. A delete confirmation box will be displayed. Click the ‘OK’ button if you wish to delete it, ‘Cancel’ if you want to leave it. You will be returned to the ‘Group Search’ page.

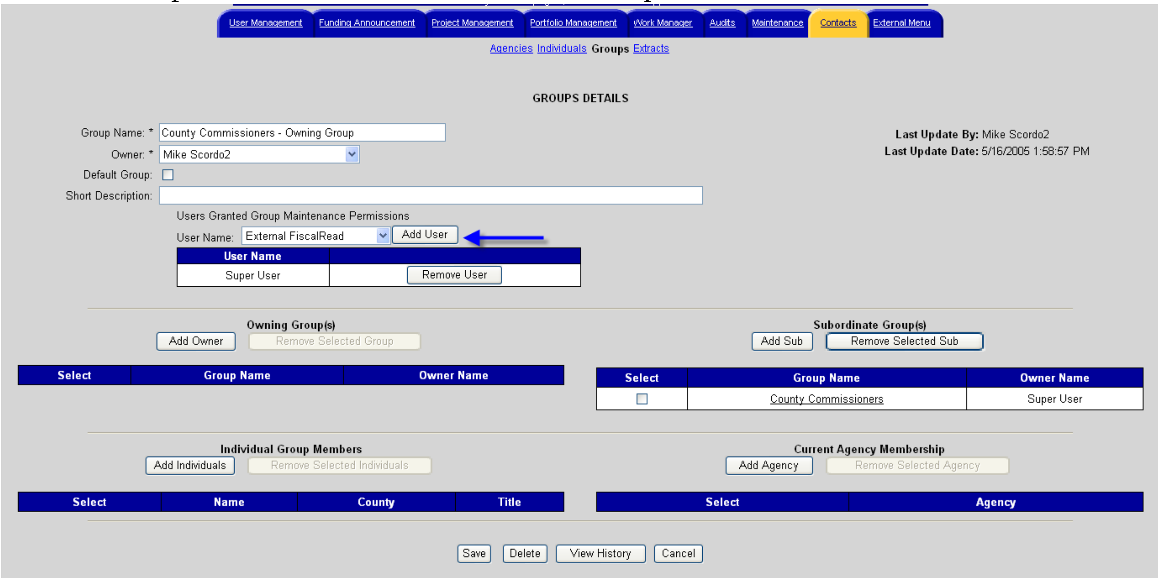


When a group is deleted it is all removed from all other groups where the Owning or Subordinate group relationship had been build.

Maintaining Write Access to Groups

Users Granted Group Maintenance Permissions is how additional users can be given access to maintain the group. By default, the group owner has this ability, plus has the security clearance to grant maintenance permissions to other users.

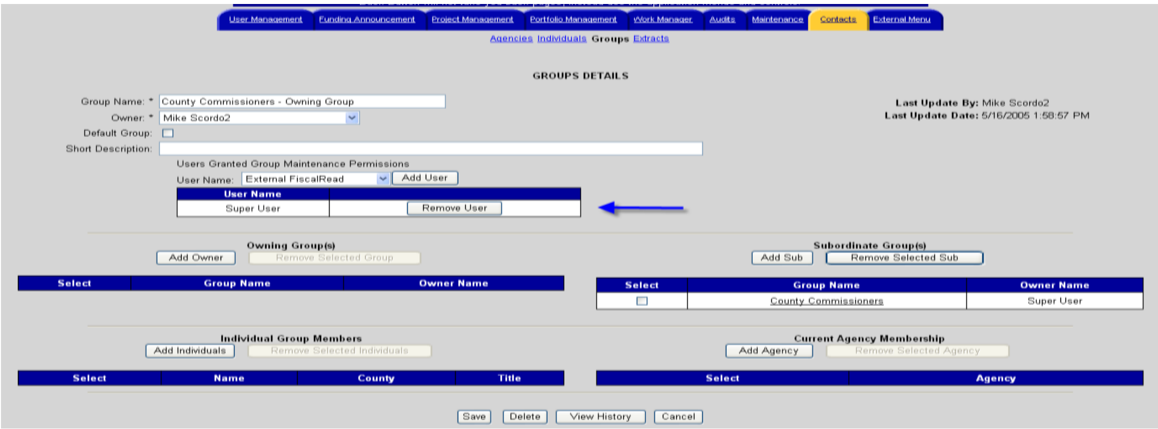
To add users pick the desired user name in the drop down and click the Add User button.



In order to remove a user from the maintenance list, click the 'Remove User' button next to the person you wish to remove from having access.

A confirmation dialog box will be displayed. Click 'OK' if you wish to remove this user, 'Cancel' if you want to leave it.

The user will be removed from the grid.



Click the ‘Save’ button at the bottom of the page to save the records, you will be returned to the ‘Groups Search’ page.

EXTRACT

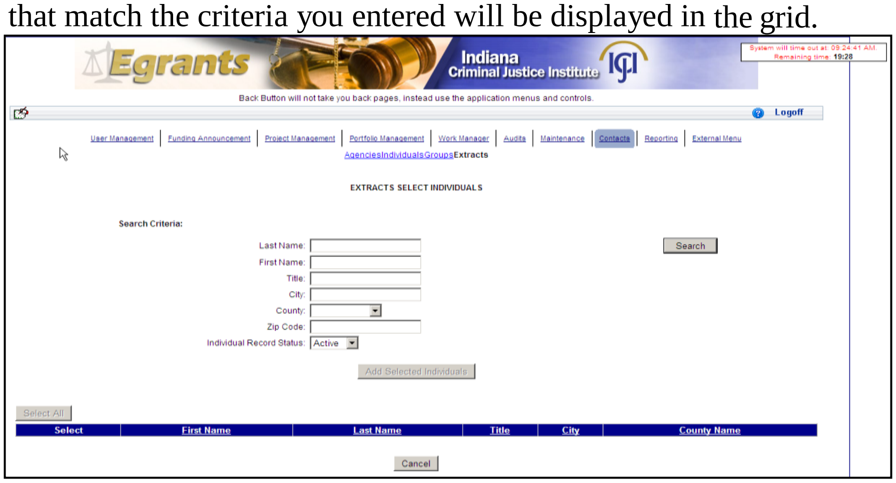
Extracts allows the user to select Individuals, Groups, Agencies and Agency Contacts to be included in the creation of data file including address information, which can be used for generating labels or an extract for use in a mail merge.

Add an Individual

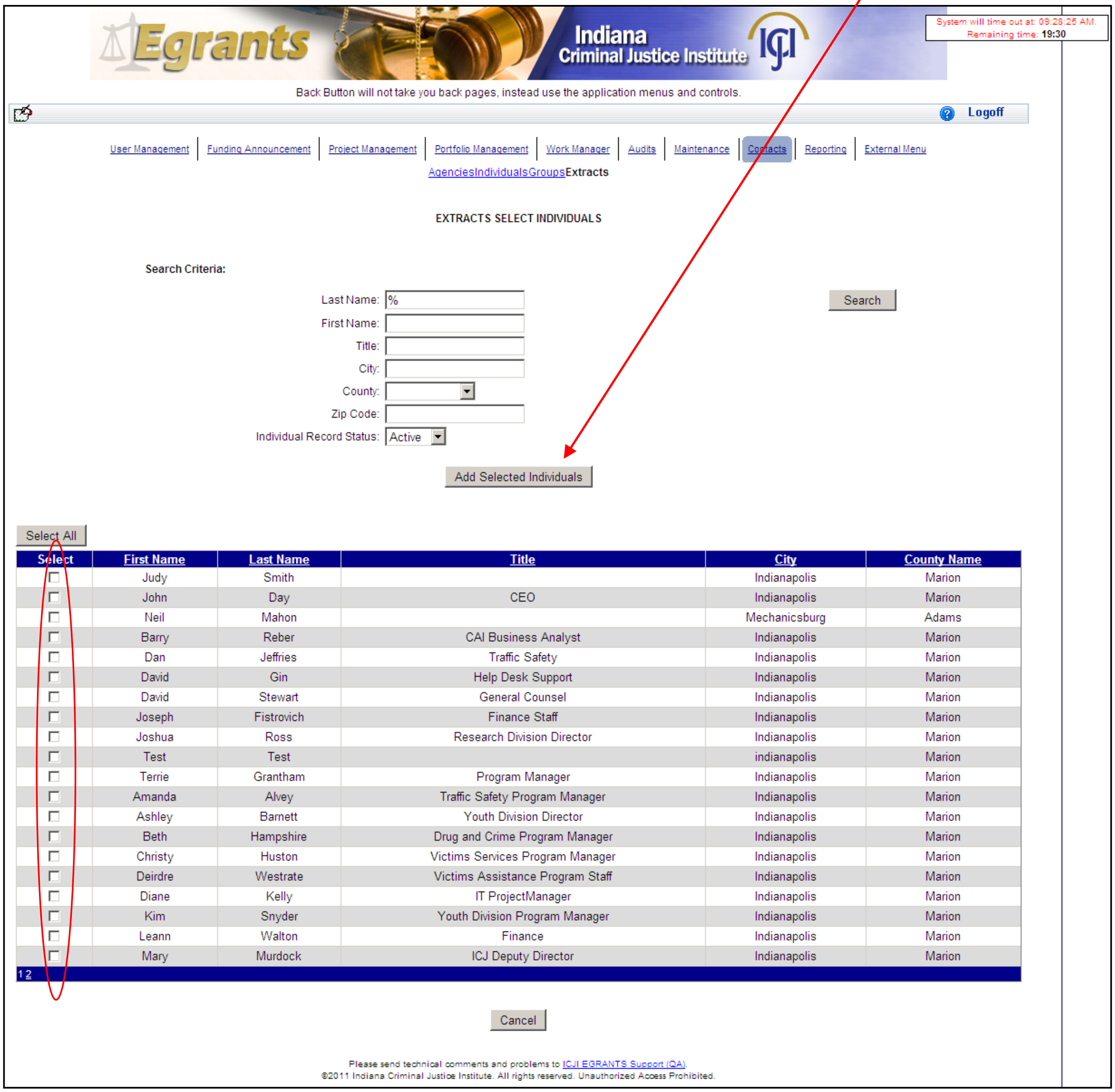
From the **Main Menu**, click the **Contacts** tab on the main menu. You will be transferred to the **Individuals Search** page.

Click on the **Extract** hyperlink. This will transfer you to the **Extracts Recipients List** page.

Click the **Add Individual** button. You will be transferred to the **Extract Select Individuals** page. Enter the search criteria for the individual that you would like to add and click the ‘Search’ button. The records that match the criteria you entered will be displayed in the grid.



Click the checkboxes next to the individuals that you wish to add. Click the 'Add Selected Individuals' button.



Select	First Name	Last Name	Title	City	County Name
☐	Judy	Smith		Indianapolis	Marion
☐	John	Day	CEO	Indianapolis	Marion
☐	Neil	Mahon		Mechanicsburg	Adams
☐	Barry	Reber	CAI Business Analyst	Indianapolis	Marion
☐	Dan	Jeffries	Traffic Safety	Indianapolis	Marion
☐	David	Gin	Help Desk Support	Indianapolis	Marion
☐	David	Stewart	General Counsel	Indianapolis	Marion
☐	Joseph	Fistrovich	Finance Staff	Indianapolis	Marion
☐	Joshua	Ross	Research Division Director	Indianapolis	Marion
☐	Test	Test		indianapolis	Marion
☐	Terrie	Grantham	Program Manager	Indianapolis	Marion
☐	Amanda	Alvey	Traffic Safety Program Manager	Indianapolis	Marion
☐	Ashley	Barnett	Youth Division Director	Indianapolis	Marion
☐	Beth	Hampshire	Drug and Crime Program Manager	Indianapolis	Marion
☐	Christy	Huston	Victims Services Program Manager	Indianapolis	Marion
☐	Deirdre	Westrate	Victims Assistance Program Staff	Indianapolis	Marion
☐	Diane	Kelly	IT ProjectManager	Indianapolis	Marion
☐	Kim	Snyder	Youth Division Program Manager	Indianapolis	Marion
☐	Leann	Walton	Finance	Indianapolis	Marion
☐	Mary	Murdock	ICJ Deputy Director	Indianapolis	Marion

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You will be returned to the 'Extracts Select Individuals' page and the record you selected will be displayed in the grid.

Add a Group

Click the ‘Add Group’ button. You will be transferred to the ‘Extracts Select Groups’ page.

Enter the search criteria for the group that you would like to add and click the ‘Search’ button. The records that match the criteria you entered will be displayed in the grid.

Click the checkboxes next to the groups that you wish to add. Click the ‘Add Selected Groups’ button.

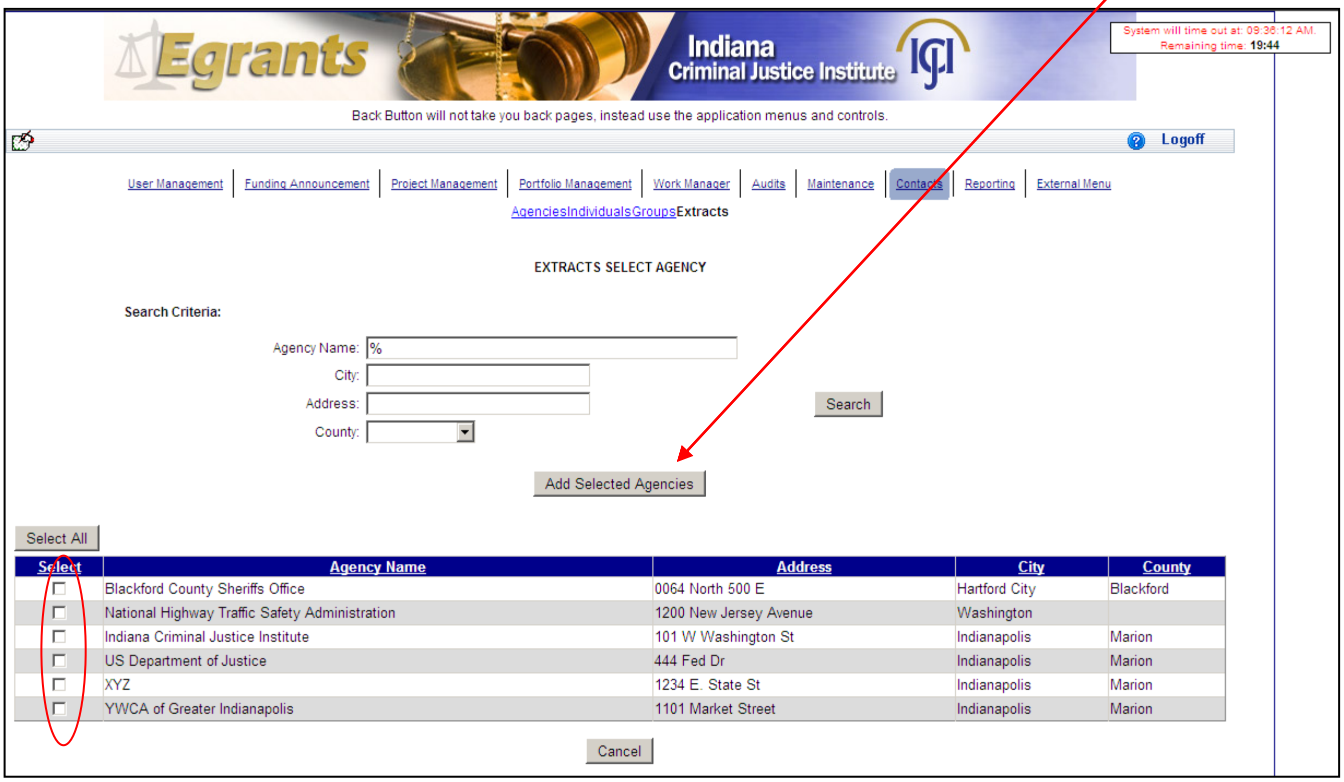
You will be returned to the ‘Extracts Recipient List’ page and the record you selected will be displayed in the grid.

Add Agency

Click the 'Add Agency' button. You will be transferred to the 'Extracts Select Agency' page.

Enter the search criteria for the agency that you would like to add and click the 'Search' button. The records that match the criteria you entered will be displayed in the grid.

Click the checkboxes next to the agency that you wish to add. Click the 'Add Selected Agencies' button.



You will be returned to the 'Extracts Recipients List' page and the record or records you selected will be displayed in the grid.

Add Agency Contact

From the 'Main Menu', click the 'Contacts' tab on the main menu. You will be transferred to the 'Individuals Search' page.

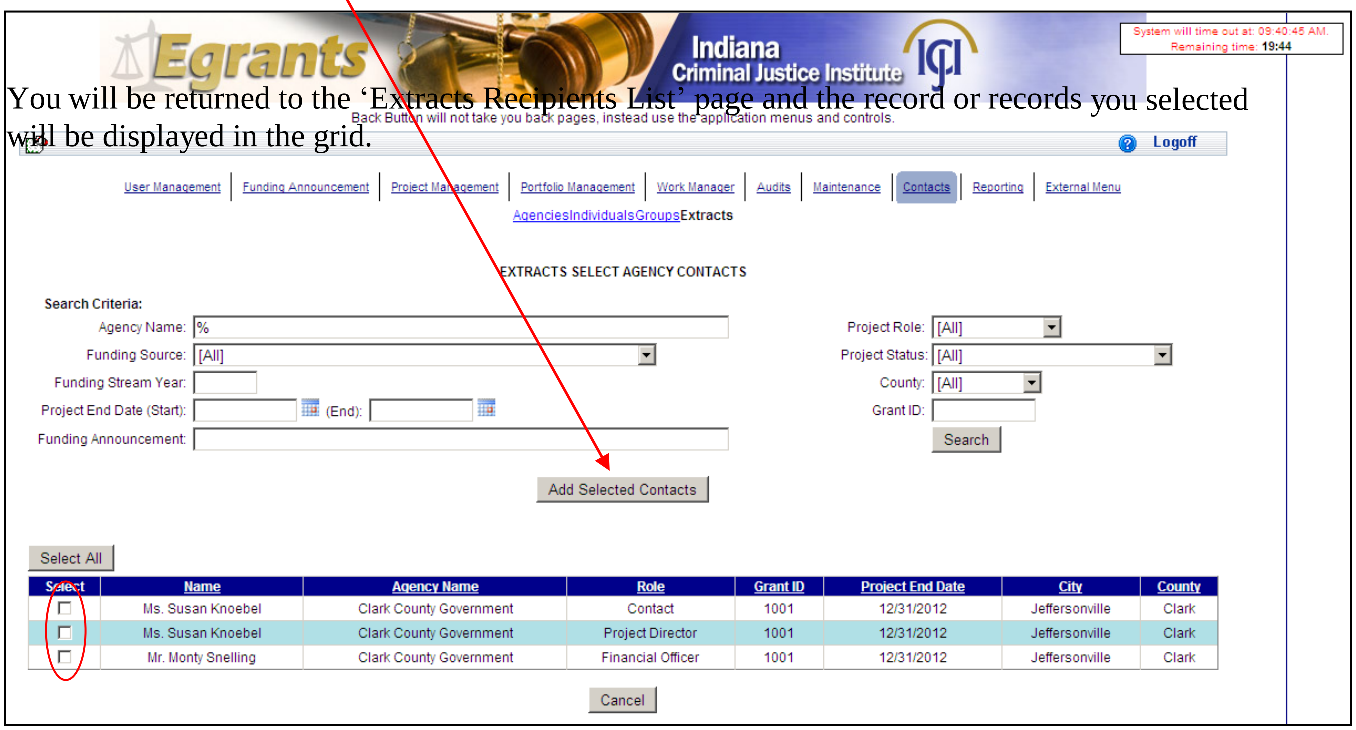
Click on the 'Extract' hyperlink. This will transfer you to the 'Extracts Recipients List' page.

Click the 'Add Agency Contact' button. You will be transferred to the 'Extracts Select Agency Contact' page.

Enter the search criteria for the agency that you would like to add and click the 'Search' button. The records that match the criteria you entered will be displayed in the grid. This example is using 'County' as the search criteria.

Click the checkboxes next to the agency contacts that you wish to add.

Click the 'Add Selected Contacts' button.



You will be returned to the 'Extracts Recipients List' page and the record or records you selected will be displayed in the grid.

Generating an Output File

Once a list has been built by selecting the desired Individuals, Groups, Agencies and Agency Contacts, you will be able to produce an output file with a few options.

Extract File

There are six possible extract selections: Mail Merge file, HTML file, Email Addresses, Labels, Mail Room or Rejection Letter extract. They are selected using the dropdown.

Once you have made your select click the ‘ProcessExtract’ button. You will see a display at the top of the page showing a clock and a message that ‘File extraction in progress. Please wait…’

A new window will open with a dialog box asking if you wish to open the file, save it, cancel or more info. This example will save the file.

A dialog box will be displayed asking to ‘Save As’ file name and directory.

Enter the information and click ‘Save’ When the download is complete you will need to click the ‘Close’ button on the dialog.

This output file can be used as a mail merge file when producing letters / mailings with MS Word.

Format Labels

Clicking this will generate a report that can be printed locally. Labels include multiple recipients and addresses on each page.

The file needs to be saved to a specific folder on your machine (currently c:\\Contacts_Label_Data\extracts.txt) so when the file _Contacts_LABELS_NORMAL1.dot is opened it loads the extract data and the result can be printed on labels.

Create Envelopes

Clicking this will generate a report that can be printed locally. Envelopes include only one recipient and address on each page.

Click the ‘Create Envelopes’ button. A ‘File Download’ (click link to view) dialog box will be displayed and you need to ‘Open’ the file or ‘Save’ it to your pc. The file name will already be filled in as exportFile.txt